

# Why AJ Bell Platinum SIPP?

## Introduction to AJ Bell

AJ Bell was set up in 1995 as an actuarial consultancy and bespoke SIPP and SSAS provider. SIPPs and SSASs have always been, and remain, core parts of the company, though AJ Bell has grown to become one of the UK's largest investment platforms, with £75.6 billion of assets under administration.

Today our bespoke SIPP and SSAS products come under the AJ Bell Platinum brand. For more information, please visit our dedicated website [ajbellplatinum.co.uk](http://ajbellplatinum.co.uk).

## Why SIPP?

A wide range of investment opportunities are available within the AJ Bell Platinum SIPP, including cash deposits, quoted equities, fixed-interest stocks and collective investments. The SIPP can also purchase UK commercial land and property, which can then be leased to the member's company or a third party. A collection of SIPPs can jointly acquire property with no limit on the number of investors involved, making them an attractive vehicle for co-directors and partners in a business.

## Our consultants

AJ Bell Platinum aims to deliver the very highest level of service. We do that by building close working relationships with our clients, taking the time to understand their particular requirements, and making sure our expert guidance is delivered in a way that is easy to understand. Key to it all are the AJ Bell Platinum consultants.



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## Testimonials

The best way to understand the value of our service is to hear from people who already use it.

We have used AJ Bell for a number of property purchase transactions for several years, and the standard of their service has been consistently excellent. On this occasion, AJ Bell's service was outstanding right from the start and the transaction completed within the limited time available, proving several other parties wrong. Overall, AJ Bell was a pleasure to work with and their service surpassed even their own high standards on this occasion.

Ian Platts, Campbell Harrison Ltd,  
Sheffield

I have worked with AJ Bell on SIPP-related property transactions on a regular basis for a number of years and have always found them to be extremely helpful and efficient during the process, taking a pragmatic approach to problem-solving whilst ensuring full compliance with pension scheme regulations in order to protect the member's interests.

Stewart Coles, Sydney Mitchell LLP,  
Birmingham

AJ Bell has been acting as professional trustees of my SIPP for many years, during which the SIPP has been involved in several complex investments and property transactions. I am happy to recommend them and have always found their knowledge, advice and service to be of the highest standard.

Ray MacDowall, Carlisle



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## Summary of the features

- The SIPP is provided by AJ Bell – a leading provider of trustee and administration services for Self-Invested Personal Pensions.
- AJ Bell Platinum SIPPs are established as a trust, with the member and AJ Bell (PP) Trustees Limited appointed as its trustees.
- You can appoint any UK Investment Manager to invest SIPP funds on your behalf.
- Each AJ Bell Platinum SIPP has a dedicated administration team and access to our consultants.
- SIPPs can invest in UK commercial property, which can then be leased to a third party, or back to the member's own business at a commercial rent.
- Our fees are clearly stated and reflect the level of work we carry out. Fees will be paid out of the member's fund.

## Awards

AJ Bell's products win prestigious industry awards year after year. Many of these accolades are awarded by judging panels of industry experts.

### Professional Adviser Awards

- Best platform for Advisers (AUA over £25bn) 2021

### UK Platform Awards

- Leading Retirement Proposition 2021

### Money Marketing Awards

- Best Platform 2021
- Provider of the Year 2021